



State of California

Employment Training Panel

Arnold Schwarzenegger, Governor

June 17, 2008

Mr. Gary Lardy President
IntelliQuote Insurance Services
5170 Golden Foothill Parkway
El Dorado Hills, CA 95762

Dear Mr. Lardy

RE: FINAL MONITORING VISIT REPORT for IntelliQuote Insurance Services – ET07-0139

Date of the Visit:	May 6, 2008
Beginning/Ending Time:	12:15 pm – 2:00 pm
Date of Last Visit:	April 3, 2007
Visit Location:	Sacramento
Persons in attendance:	Debra Bogowitz, HR Consultant for IntelliQuote, and Kristie Ohta, Program Analyst of the Employment Training Panel
Action Required:	NO

Term of Agreement:	August 8, 2006 August 7, 2008	Agreement Amount:	\$29,920
Training Start Date:	October 2006	No. to Retain:	40
Date Training must be Completed:	May 6, 2008	Range of Hours:	8 - 60
Type of Trainee:	Retrainee	Weighted Ave. Hours:	34

Ms. Ohta and Ms. Bogowitz, reviewed all training documentation and rosters for all training performed under the ETP this Agreement. Ms. Ohta showed Ms. Bogowitz, how to upload training into the ETP online tracking website.

Ms. Ohta also gave Ms. Bogowitz until May 30, 2008 to upload all training hours performed under this Agreement, and to drop all trainees that did not receive training under this Agreement, or were no longer employed with IntelliQuote. Ms. Bogowitz, contact me on the morning of May 30, 2008 and advised me she has completed all of the outstanding requirements in this Agreement. Ms. Ohta will release the suspend payment on this Agreement.

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FINAL REPORT SUMMARY:

• HISTORY OF AGREEMENT CHANGES

The Agreement was executed on August 18, 2006 and training began in October 2006. Your staff reported that all training was completed on April 30, 2008, which allows for the 90-day retention period to be completed within the term ending date of the Agreement August 7, 2008.

ETP approved one Agreement Modification on October 31, 2006, which extend the end term of the Agreement for additional year.

- What barriers, if any, did your company experience in implementing your ETP project?
Our business is growing so the biggest barrier was competing with internal priorities, during the term of our Agreement.
- What problems, if any, did your company experience with ETP record keeping?
Just our own procrastination! Once training was rolled out, everything went very smoothly.
- What assistance could ETP have provided that would improve the process for future Contractors?
Define the differences with the relationship and rolls of ETP versus CMTA. We had a bite of confusion over who to contact in the beginning.
- How did your company benefit from the ETP training?
ETP was great; all of our employees who participated in the training have benefited themselves and the company.

IntelliQuote Insurance Services records show that 41 trainees have completed training (100% of planned retentions) and 41 trainees are in their 90 day retention period (100% of planned retentions). IntelliQuote Insurance Services projects earnings to be \$29,920 (100% of the encumbered total 29,920). Current records show that IntelliQuote Insurance Services has received \$0 in progress payments, of which \$0 has been approved as earned. Ms. Ohta] reminded Ms. Bogowitz that the closeout invoice should be submitted no later than 30 days after the end term date of the Agreement

PROJECT STATUS PROVIDED BY THE CONTRACTOR:

Trainees Started Training:	67	Completed Training:	41
Dropped Following Enrollment:	26	In Retention Period:	41
Completed Minimum Hours for reimbursement:	41	Completed Retention:	

ATTENDANCE ROSTERS:

Ms. Ohta conducted 100 percent review of all rosters documenting ETP funded training. Two rosters, need trainers signature, Ms. Bogowitz was able to get the trainer signatures the day of our visit. All rosters met the Panel's approved for documentation of ETP funded training.

AUDIT:

IntelliQuote Insurance Services will be notified in writing if this agreement is selected for an audit, conducted either at your site (field audit) or by telephone (desk audit or "review"). The Audit Notification and Audit Confirmation letters will be sent in advance to allow ample preparation time and will include a list of documents that will be examined by the auditor. To provide support of training, original training attendance documentation is required; photocopied records are not acceptable. Listed below are types of records typically requested during an ETP field audit:

- Training attendance records such as rosters, sign-in sheets, etc.
- Payroll records of individual trainees to verify wage and hours worked
- Personnel records regarding occupation and dates of employment
- Documentation of employer paid health benefits (if applicable)
- Cash receipts to verify receipt and accounting of ETP funds

RECORD RETENTION:

Records must be retained within your control and be available for review at your place of business within the State of California. This responsibility will terminate no sooner than four (4) years from the date of the termination of the Agreement or three (3) years from the date of the last payment by ETP to the Contractor, or the date of resolution of appeals, audits, claims, exceptions, or litigation, whichever is later.

If you have any questions regarding this report, please contact your program analyst, Kristie Ohta at 916.327.5586 or kohta@etp.ca.gov within ten (10) days from receipt of this report.

Sincerely,



Ruby Cohen, Manager
Sacramento Regional Office



Kristie Ohta, Program Analyst
Sacramento Regional Office

cc: Debra Bogowitz – debra@ahrsigroup.com
Brian McMahon, Executive Director
Amber Luiz, Assistant Director
David Guzman, Chief, Program Operations Division
Kulbir Mayall, Manager, Fiscal and Certification
Master File
Project File